



**United States Bankruptcy Court
for the District of Arizona
230 N. 1st Street, Suite 101
Phoenix, Arizona 85003-1706
(602) 682-4000**

Terrence S. Miller
Clerk of Court

Michael R. Temple
Chief Deputy Clerk

August 7, 2007

The United States Bankruptcy Court, District of Arizona, is requesting a written quotation for Senior Visual Foxpro Programming services. A detailed Specification of Work is attached.

Special Notes:

- * This is a request for a Lowest Price, Technically Acceptable, Open Market Quotation, number IT01
- * For all quotations over \$2,500.00, the incorporation of the attached wage determination is mandatory.

Quotations are due not later than **Thursday, August 21, 2007 at 3:00 PM (MST)**. Late quotations shall not be accepted.

Offerors are to complete the attached Request for Quote (RFQ) form as submit via one of the following methods:

Fax: (602) 682-4137 (ATTN: Diane Harnisch)

Mail/Hand-Delivery: U.S. Bankruptcy Court
Attn: Diane Harnisch
230 N. 1st Avenue, Suite 101
Phoenix, Arizona 85003

Email: Diane_Harnisch@azb.uscourts.gov

Questions concerning this request are to be directed to Diane Harnisch via the above email address. Telephonic questions will not be entertained.

Quote Sheet

Offerors are to complete the following and submit with their quote:

Offeror's Name: _____

Address: _____

Telephone: _____ Fax: _____

Contact: _____ Email Address: _____

Vendor Tax ID: _____

Pricing, in accordance with the Specification of Work:

Line Item	Description	Price
001	Senior Visual Foxpro Programming services	\$_____ per hour

Additional Information, as required in the Specification of Work:

Submittal of completed Professional References and Personnel information, included as an attachment to this solicitation

Statement of Work IT Programming Services

1. **Description:** The U.S. Bankruptcy Court for the District of Arizona, 230 North First Avenue, Suite 101, Phoenix, Arizona, hereinafter referred to as the “Court” requires Senior Visual Foxpro Programming services to assist the Court in the reduction of a backlog of software modification requests (system enhancements) and bug reports (problems) associated with an electronic calendar management system called a "visual calendar" (“vCal”). All services shall be as defined within this Statement of Work.

2. **Definitions:**

- 2.1 Case Management and Electronic Case Filing System (CM/ECF): Used nationally by all federal bankruptcy courts. This computerized system allows for electronic filing, recording, tracking and closing of bankruptcy cases and related matters.
- 2.2 For The Record (FTR) Electronic Recording System: A privately developed system, both hardware and software, that the Court purchased and uses to record bankruptcy hearings and trials. The audio recorded serves as the official record of a hearing or trial and the recording is used to produce transcripts of hearings.
- 2.3 Electronic Court Recorder Operator (ECRO): Responsible for operating the FTR system during court hearings and producing log notes of all hearings.
- 2.4 Log Notes: Notes made by ECRO staff to notate the appearance of attorneys and litigants in any given hearing and the time the electronic recording system started recording evidence, testimony, etc., of an attorney or litigant. The purpose of log notes is to assist in identifying all speaking participants for the reproduction of a typewritten transcript.
- 2.5 Minute Entries: Entries made by the Courtroom Deputy, which serves to summarize the nature and subject of a hearing, and serve to indicate future required actions. vCal provides a minute entry screen for all input and a completed minute entry can also be used by the bankruptcy Judge as a form of bench order. Such minute entries can be generated in pdf. format and then recorded in the Court's computerized case management system.
- 2.6 Order: An order issued by a bankruptcy Judge, directing parties to take certain required legal action, rule on a legal issue, enforcing the bankruptcy code or other related areas of the law it has jurisdiction over.
- 2.7 Courtroom Deputy: Using vCal, the Courtroom Deputy is responsible for managing the court calendar for an assigned bankruptcy Judge. Related duties include setting matters for hearing, generating resulting hearing notices, creating minute entries, announcing the case at hearing, swearing in witnesses and receiving exhibits at hearing or trial.

3. **History of “Visual Calendar” (“vCal”):** The following information is presented to provide a background of the development and operating parameters of the Court's vCal system:
- 3.1 vCal is a scheduling and courtroom management system that automates and streamlines many tasks involved with the day to day operations of chambers staff and their judges.
- 3.2 vCal has been under continuous development at the District of Arizona Bankruptcy Court for over 14 years. The original Arizona Calendar product was a FoxPro for DOS program and was rewritten in 1996 from the ground up as a Windows application based on an object oriented framework using Visual FoxPro. Developers focus on adding to vCal’s capabilities and feature-set according to feedback received from Court staff and by other federal bankruptcy courts who also use vCal. To date, 90% of all vCal’s features are a direct result of local court user requests. vCal’s continued development has enjoyed full support over the years by the District of Arizona judges as well as the District of Arizona clerks office. vCal also interacts with the Court's automated case management system, called "CM/ECF" (Case Management/Electronic Case Filing). The vCal program interacts with CM/ECF which allows data sharing and streamlines operational processes by setting hearings, recording (docketing) information, tracking dates, etc. See paragraph 3.3.6, below.
- 3.3 Major features included but not limited to are:
- 3.3.1 **Calendar management:** vCal supports setting both chambers and personal (private) calendar items. While working with hearings, live CM/ECF case data is used extensively, eliminating manual data entry. Numerous data integrity and schedule conflict resolution features ensure data validity and accuracy. Automated management of hearing requests makes calendar management more efficient. Alerts and reminders can be set to notify of upcoming appointments and special events.
- 3.3.2 **Preferences:** vCal is very “user preference” driven, this enables each chambers to customize their calendar as they see fit. Extensive hearing defaults, display settings, CM/ECF data integration and calendar printing options exist to provide the flexibility that judges and chambers personnel want most.
- 3.3.3 **Reporting:** Many hard copy and electronic reports are available in vCal (Calendars, Log Sheets, Minute Entries, Orders, Transcript Orders to name a few). If needed, custom reports are easily created and integrated into vCal using Crystal Reports. Preformatted report data makes it easy to create reports for almost any need.
- 3.3.4 **PDA Interface:** Easily synchronizes a PDA calendar with vCal summary data.

3.3.5 Notes: Hearing notes, case notes and daily notes are all available, as well as notes specifically for Judges, Law Clerks, Deputies etc. Hearing and case notes carry forward as different hearings and cases progress, enabling “journal” type note entries. Tentative setting and ruling notes are available as well. RTF (rich text format) features enable word processor capabilities right in vCal (under development). Spell checking is fully supported in any text field.

3.3.6 CM/ECF Integration: In addition to dynamic case information access, vCal also supports the following with no modifications to CM/ECF source code:

- a. Automated docketing of minute entries/proceedings memos.
- b. Extensive CM/ECF integration, with the complete automation of the CM/ECF calendar.
- c. Automated CM/ECF docket lookup with full support for all case documents.
- d. Support for the E-Orders CM/ECF module.

CM/ECF user login credentials are encrypted into vCal users’ profiles, giving them access to CM/ECF right from vCal without having to log in repeatedly to CM/ECF.

3.3.7 FTR Digital Recording/Log Notes Integration: Judges and other users can listen to FTR digital audio for a particular hearing right inside vCal, enabling quick access to court recordings. FTR Log Notes can be generated within vCal, automatically formatted with hearing and case information. Coupled with the vCal Electronic Court Reporting Operator (ECRO) transcript ordering system, these features can result in a paperless transcript ordering system.

3.3.8 ECRO Transcript Orders: A full ordering system is integrated into vCal with support for Products, Customers and Vendors. Existing calendar information is leveraged for transcript orders and case information record reports. Pending order list displays the status of each order making it easy to see which orders need attention.

3.3.9 Touch Screen Kiosks: vCal includes a calendar lookup module for use in touch screen computer kiosks. Eliminate manual calendar posting by placing touch screen kiosks outside of each courtroom. This enables secure, dynamic public access to the live calendar data anywhere in the courthouse and clerks office public areas.

3.3.10 Automated Maintenance and Updates: vCal includes automated utilities for all of its periodic maintenance and does not require a Visual FoxPro license. Deployed updates are installed in an automated fashion with little

effort required by local administrators. Most updates are as simple as copying an updated file to the central vCal install folder.

3.3.11 **Speediest:** User defined blocks of text can be inserted into vCal text fields easily. Anything from a word or phrase, to a full document can be inserted at any time, enabling reuse of boilerplate text.

3.3.12 **Security and Auditing:** Over 250 discrete security items are available that can be granted, giving full control of who can do what and when. Default permission templates are included to get you up and going as quickly as possible. An integrated tracking system logs user actions that can be reviewed at any time.

4. **Scope:** The Court currently has a backlog of approximately 70 software modification requests and bug reports associated with this electronic calendar management system. A copy of this list is attached. The contractor will be responsible for:

4.1 **Modification Requests**

- 4.1.1 Analyze existing process
- 4.1.2 Quantify system impact
- 4.1.3 Create specification for implementation
- 4.1.4 Implement modification
- 4.1.5 Test

4.2 **Bug Reports**

- 4.2.1 Validate and Reproduce the bug
- 4.2.2 Quantify system impact
- 4.2.3 Create specification for implementation
- 4.2.4 Implement modification
- 4.2.5 Test

5. **Minimum Skills:** The Contractor's personnel shall have, at a minimum, the following skills and a working knowledge of applied application for each:

- 5.1 *Visual FoxPro* Version 8/9 (5+ years)
- 5.2 Remote Data Access (5+ years)
- 5.3 Framework and OOP (5+ years)
- 5.4 Crystal Reports (1+ year)
- 5.5 Install Shield (1+ year)
- 5.6 Visual Source Safe (1+ year)

6. Service Performance Parameters:

- 6.1 Tasks: The contractor will be responsible the successful application of modification requests and the successful corrective action of bug reports. The contractor will not be required to perform any other tasks than those associated with the modification requests and the bug reports (i.e., system integration, software installation or any other application not directly associates with vCal). It is estimated the total number of hours associated with this contract will not exceed 1,500; the number of hours associated with a specific modification request or bug report will be determined at time of task assignment; reference 6.2, below.
- 6.2 Assignment of Task: The contractor and a designated Court MIS staff member will review the attached list and the contractor will be assigned either a specific modification request or bug report. The number of estimated hours to complete the task will be mutually agreed at the time of task assignment. If the Contractor determines that more time is required for a specific modification request, the job time record form will be annotated as to the reasons why additional labor hours are necessary.
- 6.3 Record of Time: The contractor will be required to maintain the number of direct labor hours performed for each specific maintenance request. The required daily job time record form will be provided to the contractor at the time of contract award.
- 6.4 Orientation: The contractor will be reimbursed for up to 24 hours for orientation at start of contracted services, to include one or more contractor personnel. If replacement contractor personnel are required (reference paragraph 8, below, the contractor will not receive payment for any additional orientation.
- 6.5 Government-Furnished Property: The Court will provide all necessary equipment, including office space, access to a telephone, copier and a fax machine, computer and the internet. Due to security issues, off-site work will not be approved. Such access shall also include access to the vCal program, including source code in such a fashion as to allow for requested work to be completed while not interfering with the "live" version of vCal currently in use.
- 6.6 Identification as an Independent Contractor: The contractor shall be required to wear an identification tag, to be provided by the contractor, at all times while on government property. This identification tag will include both the name of the individual and the company. Any correspondence which may be signed by the contractor, including internal email and any other memoranda, shall include the name of the individual and the company in the signature line or in another clearly identifiable location. Each individual shall also be required to wear a yellow contractor's badge (reference paragraph 9.3, below) in plain sight at all times while on government property.

- 6.7 Place of Performance and Related Hours of Operation: Services will be provided at the U.S. Bankruptcy Court, Division of Arizona, 230 N. 1st Avenue, Phoenix, Arizona. The contractor will have access to the facility Monday through Friday, 8:00 AM to 5:00 PM.
- 6.8 Overtime/Holiday Pay: The contractor will not be authorized to perform any on an overtime basis. Related services shall not exceed 40 hours in any given week, nor will the contractor be authorized holiday pay.
- 6.9 Subcontracts: Subcontracts shall not be authorized.
- 6.10 Direct Material Costs: Direct material costs, defined as those materials that enter directly into the end product, or that are used or consumed directly with the furnishing of the end product, shall not be authorized.
- 6.11 Total Cost: It is estimated that the total cost to the judiciary for the performance of this contract shall not exceed the ceiling price of \$ 99,900.00. The Court will not be obligated to pay the contractor any amount in excess of this ceiling price and the contractor shall not be obligated to continue performance if to do so would exceed this ceiling price.
- 6.12 Travel, Per Diem and Parking Costs: Any and all travel, commuting expenses and per diem costs shall be the responsibility of the contractor. In addition, parking around the courthouse is at a premium; all parking arrangements and associated parking costs shall also be the responsibility of the contractor.
7. **Term of Services:** The term of services shall be from the date of contract award until (1) the completion of all modification requests as identified in the attachment, (2) the contract has reached the ceiling price identified in paragraph 6.11, above, or (3) the contract has been in effect for twelve months (12). The contract period shall not extend past twelve (12) months.
8. **Replacement Personnel:**
- 8.1 The contractor shall be responsible for providing qualified personnel to provide programming services, as defined within this Statement of Work. The Court reserves the right to request the replacement of any individual which, in their opinion, does not possess either the required minimum skills or is not performing at an acceptable standard. The contractor shall be immediately notified by the contracting officer that a replacement is required.
- 8.2 The contractor may request the replacement of an individual by providing a detailed explanation of the circumstances necessitating substitution, to the contracting officer.
- 8.3 Documentation substantiating the replacement possesses the required minimum skills shall be provided to the contracting officer. If accepted, the contractor shall be notified in writing of the acceptance of the replacement.

- 8.4 All replacement personnel shall be required to complete and submit a security clearance package, as outlined in paragraph 9.3, below.

9. Security Clearances:

- 9.1 Each individual, who will be working for the government under contract, will be required to complete and submit a clearance package consisting of 2 fingerprint cards and Standard Form 85P, Questionnaire for Public Trust Positions", a copy of which is included in this solicitation document. **Offerors are not required to provide this information with their quote.** The contracting officer will coordinate receipt of this documentation with the successful offeror at time of contract award.
- 9.2 Fingerprints will be taken by the Department of Homeland Security (DHS), located at the US Bankruptcy Court, 230 N. 1st Avenue, Phoenix, Arizona.
- 9.3 While there is an initial clearance and a final clearance, individuals will be authorized to begin work at the Court upon a favorable initial clearance from the Department of Homeland Security. Cleared individuals will be provided yellow contractor's badge. Clearances are valid for a period of five (5) years.
- 9.4 Contractor personnel shall only access the Court by passing through building security located at the main entrance. Use of employee entrances is strictly forbidden.
- 9.5 If an unfavorable clearance is received, that individual shall not be allowed access to the government facility. Replacement of the person shall be in accordance with paragraph 8, above.
- 9.6 The contractor will not be reimbursed for any time related to obtaining security clearances and fingerprints.

10. Performance Standard: The performance of the contractor will be based on the following:

- 10.1 Modification Requests: The success of the application for the modification request will be used to determine acceptable performance standard.
- 10.2 Bug Reports: The correction of the bug report will be used to determine acceptable performance standard.

11. Payments to the Contractor for Modification Requests and Bug Reports:

- 11.1 Payments to the contractor shall be based on the following:

- 11.1.1 The number of direct labor hours associated with a specific

- 11.1.2 modification request and/or bug report, and
The hourly rate as stated on the Quote Sheet.

11.2 Invoices will be accompanied by a certified job time record that has been verified by the Information Technologies Supervisor or designated representative and approved by the contracting officer.

12. Selection for Award: This procurement will be awarded to the lowest priced offer which meets the following minimum technical requirements and is made by a responsible offeror:

12.1 Experience: The offeror provides documentation which supports both the offeror and proposed personnel have successful past performance in providing the type of services as identified within this Statement of Work;

12.2 Expertise: The offeror provides documentation which supports their personnel posses the minimum required levels of skills as identified within this Statement of Work, and

13. Required Documentation: The offeror is to submit the following documents with their quote:

- 13.1 Quote Sheet
- 13.2 Professional References
- 13.3 Personnel Information

Professional References

The offeror is to provide three (3) separate professional services references, which will substantiate the offeror has the experience in providing similar services as identified in this Statement of Work. (This document may be reproduced as necessary to accommodate information):

Reference Number One:

Name of Company: _____

Contact Name: _____ Telephone: _____ Email: _____

Date(s) of Services: _____

Detailed Description of Services Provided : _____

Reference Number Two:

Name of Company: _____

Contact Name: _____ Telephone: _____ Email: _____

Date(s) of Services: _____

Detailed Description of Services Provided : _____

Reference Number Three:

Name of Company: _____

Contact Name: _____ Telephone: _____ Email: _____

Date(s) of Services: _____

Description of Services Provided:

Personnel Information

The offeror should submit the name(s) of the individuals which would provide the required services under any resultant contract and their related experience, as follows. (Note: The Court would be interested in the services of more than one individual): (This document may be reproduced as necessary to accommodate information):

1. **Name of Individual:** _____

2. **Expertise:** This individual possesses the following minimum skills (check all that apply):

- ☐ *Visual FoxPro Version 8/9* 5+ years minimum experience
Years Experience: _____
- ☐ Remote Data Access 5+ years minimum experience
Years Experience: _____
- ☐ Framework and OOP 5+ years minimum experience
Years Experience: _____
- ☐ Crystal Reports 1+ years minimum experience
Years Experience: _____
- ☐ Install Shield 1+ years minimum experience
Years Experience: _____
- ☐ Visual Source Safe 1+ years minimum experience
Years Experience: _____
- ☐ Additional Related Experience: _____

3. **Experience:**

3.1 The offeror should provide information which would substantiate the individual has the experience in providing the type of services as outlined in the Statement of Work. The experience need not be while currently employed with the offeror:

Name of Company: _____

Contact Name: _____ Telephone: _____ Email: _____

Date(s) of Services: _____

Scope of Project: _____

3.2 How does this project experience relate to the required services contained within this Statement of Work?

3.3 List all affiliations, organizations or memberships in related associations:

3.4 Provide copies of any certifications, etc. associated with the list of minimum skills.

3.5 List any publications, trade journals, newspapers, etc. in which the individual has been published: _____

Provisions and Clauses

REQUIRED PROVISIONS AND CLAUSES FOR ALL OPEN MARKET SMALL PURCHASES:

1. **JP3 Provision B-1, Solicitation Provisions Incorporated by Reference (AUG 2004):**

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provisions by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this address: <http://www.uscourts.gov/procurement/clauses.htm>

2. **JP3 Clause B-5 Clauses Incorporated by Reference (AUG 2004):**

This procurement incorporates one or more clauses by reference, with the same force and effects as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a solicitation provision may be accessed electronically at the address above.

3. **JP3 Clause 3-3, Provisions, Clauses, Terms and Conditions - Small Purchases (AUG 2004):**

The CO may add additional Standard Judiciary Provisions and Clauses if appropriate to the procurement and as noted below:

JP3 Clause 2-25A	Delivery Terms and Contractor's Responsibilities (JAN 2003)
JP3 Clause 2-20C	Warranty of Services (JAN 2003)
JP3 Clause 2-60	Stop-Work Order (JAN 2003)
JP3 Clause 3-75	Limited Criminal Background Check (JAN 2003)
JP3 Clause 3-80	Judiciary Property (JAN 2003)
JP3 Clause 3-160	Service Contract Act of 1965, as Amended (JAN 2003)
JP3 Clause 4-30	Payment (Time-and-Materials and Labor-Hour Procurements) (JAN 2003)
JP3 Clause 7-15	Observance of Regulations/Standards of Conduct (JAN 2003)
JP3 Clause 7-20	Security Requirements (JAN 2003)
JP3 Clause 7-30	Public Use of the Name of the Federal Judiciary (JAN 2003)
JP3 Clause 7-35	Disclosure or Use of Information (AUG 2004)
JP3 Clause 7-40	Contractor Relationships (JAN 2003)
JP3 Clause 7-55	Contractor Use of Judiciary Networks (JAN 2003)
JP3 Clause 7-235	Disputes (JAN 2003)
JP3 Clause 7-220	Termination for Convenience of the Judiciary (Short Form) (AUG 2004)

JP3 Provision 3-135, Single or Multiple Awards (JAN 2003)

The judiciary may elect to award a single contract or to award multiple contracts for the same or similar products or services to two or more sources under this solicitation.

WAGE DETERMINATION PROVIDED IN SEPARATE ATTACHMENT

SF 85P PROVIDED IN SEPARATE ATTACHMENT

FOR INFORMATIONAL PURPOSES ONLY

NOT REQUIRED TO BE SUBMITTED AS PART OF QUOTATION

**COPY OF MAINTENANCE REQUESTS AND BUG REPORTS
PROVIDED AS SEPARATE ATTACHMENT**

**END OF REQUEST FOR QUOTATION
IT01**